

**MASSACHUSETTS**  
Public Employee Retirement Administration Commission  
5 Middlesex Avenue, 3rd Floor  
Somerville, MA 02145  
(617) 666-4446  
Fax: (617) 628-4002  
[www.state.ma.us/PERAC](http://www.state.ma.us/PERAC)

**MEMORANDUM**

**TO:** All Retirement Boards

**FROM:** Joseph E. Connarton, Executive Director

**RE:** Clarification of Disability Forms and Section 8 Evaluation process

**DATE:** January 28, 2000

The recent PERAC training sessions gave the Disability Unit staff an opportunity to discuss with retirement boards issues related to the new disability forms and Section 8 evaluations.

- **Templates**

We are pleased to announce that templates have been posted on PERAC's Homepage for all disability forms. You may access the templates via our Homepage. You may either download the template and save it to your pc or enter the information directly on to the template and download and print it. Please note that the header information carries forward to each successive page of each form. We again ask, for reasons of confidentiality, that the documents not be attached to e-mails and transmitted to other parties. If you encounter any problems completing the templates, please contact our Communications Department.

- **Completion of Release Forms**

Questions were raised with regard to the Medical Release forms found within the Member Application. Please note that the 'Keeper of the Record', for the Release of Information, is the name of the person from whom you are seeking the record. The Name of the Insurer/Agency is the entity itself. The 'Keeper of the Record' and the Name of the Insurer/Agency may be one and the same.

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- **Release of Medical Records**

The time period of 5 years specified on page 14 of the Member Application (Release of Medical Records section) allows the retirement board to obtain a complete medical history on the applicant's medical condition(s) for at least 5 years prior to the date beside the applicant's signature on the form. This language does not limit the retirement board from obtaining information for periods longer than 5 years.

- **Physician Statement**

A concern was raised that the 'Physician Statement' did not provide a block for the 'Basis of Claimed Disability'. This information is not provided to the primary care physician or treating physician by the retirement board but rather, the primary care physician or treating physician makes this determination and submits an analysis of the applicant's medical condition to the retirement board and medical panel.

### **Changes to Section 8 procedure**

Following the training sessions, PERAC reviewed existing CME/Restoration to Service procedures. Although the process is working well, suggestions from the boards have helped us simplify the process and reduce the paper flow for both PERAC and the retirement boards. The following changes enhance the process without compromising PERAC's goal of having current and complete medical information in each member's file.

The goal of the Section 8 evaluation is to have the PERAC case manager obtain current, complete and accurate medical information on the member, so that a determination may be rendered on the member's ability to perform the essential duties of the position from which he or she retired.

The first step in the process is to generate the Selection List. Retirement boards are sent a list of retirees to be evaluated and asked to complete the **CURRENT INFORMATION ON MEMBERS RETIRED FOR DISABILITY** Form. The retirement board is also asked to submit any new information to PERAC that the retirement board feels could impact on the review process, such as the member is currently in the hospital or that a family crisis has occurred. This information may prompt the case manager to delay the review process and diary the case ahead for several months. **We ask that you DO NOT send a copy of the complete Disability file and previous re-examinations to PERAC at this time**. If a determination can be made without these documents, the retirement board will not be asked to provide copies of these documents.

The PERAC Case Manager reviews the PERAC file (if available), the PERAC system file and any new information submitted by the retirement board.

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The PERAC Case Manager then contacts the member to request complete and current medical information. The information received from the member is reviewed carefully by the Case Manager.

If the member fails to provide medical information because he or she has not had on-going medical care and the PERAC file is not available or complete, the retirement board will be contacted and asked to provide the complete disability file and copies of all previous re-examinations conducted.

If it is necessary for the member to have a comprehensive medical evaluation by a single physician, the employer is contacted and asked to submit a job description and identify the essential duties of the job.

The changes to the CME/RTS procedure and associated letters and other documents contained in the **BASICS OF THE DISABILITY RETIREMENT PROCESS** manual, are being made and will be sent to you under separate cover. When you receive the revised documents, please insert the new material in your manual and discard the old documents. If you have any questions, please contact Barbara Lagorio, Disability Unit Director or Patricia Lowery, Assistant Director at (617) 666-4446 x956.